

FY 2004 Beta Evaluation Report Guidance¹
Date Prepared

Submitted by: _____ **<signature²**
Name and Title:

Project Number and Title:
Software Name(s):

Principal Investigator:

Beta Test Participants and Code Users Consulted:³

Name and Title	Organization and Position	Commercial Phone Number and E-mail Address

Technical Metrics Test Summary:⁴

¹ This is the evaluation report prepared by the **CTA/Portfolio Leader**.

² Sign a hard copy of this report and mail it to the SAS PM. The address is in the Beta Test Guidance.

³ List any users of the software who participated in the test event or provided feedback concerning the software's suitability in meeting their requirements. If this list is extensive, include it as an attachment to the report.

⁴ Discuss your take on the Beta test report.

Beta Test and Evaluation Overview ⁵		
Purpose	How	CTA/Portfolio Leader's Evaluation Comments
Ensure DoD relevance.	Examine the test plan against the project's approved CTPs. Ensure systems and cases/data planned for testing actually test the CTPs. Refine test plan and cases/data as necessary. Obtain approval for the revisions from the SAS PM.	Provide comments about the validity of the test plan and cases/scenarios.
		Comments:
Determine the performance of the code.	1. Test the code against the Beta-level CTPs. 2. Evaluate the code's readiness for Beta release to wider user community.	Provide comments about the test's conduct and results . Describe the maturity of the code and whether or not it is ready for Beta release.
		Comments:
Obtain user feedback about the usefulness of the code.	1. Obtain extensive user feedback concerning requirements vis-à-vis the code's current and planned performance. 2. Propose modifications to the code's capabilities as appropriate. 3. Obtain user feedback concerning the code's documentation. 4. Propose modifications to manuals and instructional materials as appropriate.	From your own discussions with users, provide your appraisal of the code's value in meeting user requirements and the suitability of its documentation . Specify any additional work that must be done in this regard.
		Comments:

⁵ See grey areas for instructions on the expected content of your comments.

Beta Test and Evaluation Overview ⁵		
Purpose	How	CTA/Portfolio Leader's Evaluation Comments
Identify and ameliorate risks of the project.	1. Review PMI performance. 2. Document lessons learned.	Comment upon your review of the project's overall management and technical performance . Specify any remedial actions that must be done in this regard. (Specific PMI performance will be discussed later in this report.)
		Comments:

Project Management Indicators (PMIs):⁶

PMI	Project Principal Investigator	CTA/Portfolio Leader's Evaluation
1-1	<ul style="list-style-type: none"> - Prepares, reviews, updates, and refines project documentation in accordance with guidelines and lessons learned. - Maintains document version control to ensure all changes are tracked and justified. 	
1-2	<ul style="list-style-type: none"> - Prepares, reviews, updates, and refines the SDP in accordance with guidelines and lessons learned. - Ensures the development team is fully aware of and consults the SDP. - Uses the SDP as a working document and frequently reviews it with team members for compliance, planning, and recommended refinements. 	
1-3	<ul style="list-style-type: none"> - Complies with <i>(technical and financial)</i> reporting requirements. 	

⁶ Refer to Appendix A, Table 3, for a complete description of the indicators. Under *CTA/Portfolio Leader's Evaluation*, relate the results of your examination of the PMI and any strengths or deficiencies noted. If there are deficiencies noted for the PMI, provide a statement of remedial action required along with a suspense date.

PMI	Project Principal Investigator	CTA/Portfolio Leader's Evaluation
1-4	<ul style="list-style-type: none"> - Manages team performance and communication. - Reviews, refines and updates the WBS when reviewing the SDP. 	
1-5	<ul style="list-style-type: none"> - Monitors development team progress and takes remedial action as necessary. - Ensures compliance with SDP and associated contracts. - Provides progress and remediation reports to the CTA/Portfolio Leader as required. 	
2-1	<ul style="list-style-type: none"> - Solicits (user) requirements and input as appropriate. - Provides timely feedback. 	
2-2	<ul style="list-style-type: none"> - Manages error identification, fix and testing procedures and oversees compliance. - Establishes systematic procedures to keep the team and users aware of same. 	
2-3	<ul style="list-style-type: none"> - Establishes regular meetings with the development team to review requirements, schedules and progress and to identify problems. - Regularly briefs CTA/Portfolio Leader and management chain. 	
3-1	<ul style="list-style-type: none"> - Prepares, refines, and updates manuals. - Develops, publishes, and keeps current a lessons learned repository. - Solicits and incorporates recommended changes and improvements. - Provides authorized users with necessary documentation and scripts as well as appropriate portions of the lessons learned repository. 	
3-2	<ul style="list-style-type: none"> - Prepares, refines, updates, and promulgates user information and training materials. - Obtains feedback from the user community concerning the assistance/ information provided. 	

PMI	Project Principal Investigator	CTA/Portfolio Leader's Evaluation
3-3	<ul style="list-style-type: none"> - Works with supervisor, local security personnel, and the CTA/Portfolio Leader to determine and enforce export control and security restrictions early development process and validates such restrictions as the software capability develops and export control and security guidance changes. - Ensures hosting shared resource center systems administration staff are aware of restrictions to the code and affiliated data. 	
3-4	<ul style="list-style-type: none"> - Provides current documentation to the CTA/Portfolio Leader as significant changes develop or after several nominal changes are made to the documentation and code. - Promulgates fixes as appropriate. 	

Beta Evaluation Recommendation and Summary:⁷

Remedial Actions and Suspenses:⁸

⁷ Provide a synopsis of your evaluation of the project at this stage of development and your recommendation of the project's Beta test performance evaluation. Specifically state whether you think the project passed the milestone and is ready for use by a wider community. If your recommendation is suspended pending the resolution of critical items (to be described below), so state.

⁸ List all remedial actions and their corresponding suspense dates. The Project Principal Investigator must show all remedial actions and suspense dates on the project's next and subsequent quarterly reports until all are closed out or the project is terminated.

Mandatory Attachments:⁹

Items	Originator	MS Office- Compatible Electronic Media
Beta Test Plan (Approved version used for the test event)	Project Principal Investigator	MS Word, RTF or PDF
Presentation materials (viewgraphs) ¹⁰	Project Principal Investigator, and CTA/Portfolio Leader	MS PowerPoint
User comments and critiques (if available)	Project Principal Investigator, and CTA/Portfolio Leader	MS Word, RTF or PDF
User and installation manuals and other pertinent <i>technical</i> documentation extant	Project Principal Investigator	MS Word, RTF or PDF
Examples of representative code front-end(s), input and output, validation scripts, etc.	Project Principal Investigator	RTF or PDF
Other project <i>management</i> plans (if applicable)	Project Principal Investigator	MS Word, RTF or PDF

⁹ Provide all attachments listed in the table in electronic format compatible with the MS Office Suite.

¹⁰ Refer to the Beta Review Guidance document for details on the content of the presentation materials.